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Montana  
Office of Public Instruction  
Denise Juneau, State Superintendent

## School Finance



### Fall Student Count for ANB

The official fall count day is Monday, **October 6, 2014**. MAEFAIRS Student Count for ANB must be submitted no later than **October 17, 2014**.

The following resources are located on the OPI website:

- ANB Memo: [CLICK HERE](#)
- Reporting Instructions: [CLICK HERE](#)
- Step-by-Step Student Count for ANB Instructions: [CLICK HERE](#)

Questions:

- For MAEFAIRS questions, or to correct data once it has been submitted, please contact Nica Meralo at (406) 444-4401 or [nmerala@mt.gov](mailto:nmerala@mt.gov).
- For AIM questions, including how to correct student information in order to be included in the MAEFAIRS Student Count for ANB, please contact the AIM Helpdesk at 1-877-424-6681, or locally at (406) 444-3800 or [opiainhelp@mt.gov](mailto:opiainhelp@mt.gov).

### Reporting American Indian Students

Students identified as American Indian in the AIM system at the time the data is imported into the MAEFAIRS fall count will generate funding for the Student Achievement Gap (SAG) payment in the ensuing year.

School district business managers/clerks should verify that the *Students Imported From AIM In SAG Report* located in the MAEFAIRS system accurately reports the number of American Indian students enrolled in the district. If the report is not correct, please contact Nica Meralo at (406) 444-4401 or [nmerala@mt.gov](mailto:nmerala@mt.gov) to make the necessary changes.

Pursuant to ARM 10.21.205, changes to this designation will not be accepted after December 31.

### **Impact Aid Payments 2014**

Congressional funds have not yet been appropriated for fiscal year 2015. It is expected that FY 2015 will begin under a continuing resolution. Districts should expect their initial FY 2015 payment to be set at 50% of LOT. Districts who need an initial payment in October or November may request an early payment by contacting the Department of Education at the following link: [CLICK HERE](#). Payments for all districts are expected to begin in December or January.

OPI contact: Nicole Thuotte at (406) 444-4524 or [nthuotte@mt.gov](mailto:nthuotte@mt.gov)

### **Tuition/Attendance Agreements**

*All* out-of-district students must have a fully completed attendance agreement on file with the District of Choice/Attendance. Students without signed attendance agreements are not considered “enrolled” in the district and are not eligible to be counted for ANB. To be eligible for ANB, the FP-14 form must be initiated and signed by the proper agent (the parent/guardian or District of Residence – Section I) and signed by BOTH the board chair of District of Choice/Attendance *and* the District of Residence (Section IV).

If the District of Choice charges tuition, the approval of the District of Residence is required. If no tuition is charged, the District of Residence simply acknowledges the agreement. Again, the tuition agreement is not valid without the signatures of both the District of Choice/Attendance and the District of Residence.

OPI contact: Nicole Thuotte at (406) 444-4524 or [nthuotte@mt.gov](mailto:nthuotte@mt.gov)

### **FY 2014 A-133 Audit Compliance Supplement**

The FY 2014 A-133 Audit Compliance Supplement has been released. The document can be accessed at the following link: [CLICK HERE](#)

OPI contact: [Steve Hamel](#), (406) 444-0783

### **Changes to FY 2014 Trustees Financial Summary**

If you find a material coding error on your FY2014 Trustees Financial Summary (TFS), you may submit a revision to Steve Hamel in the School Finance Division. As

provided in 10.10.504(6), Administrative Rules of Montana, changes to the FY2013-14 Trustees Financial Summary are limited to:

- Coding revisions between revenue and expenditure line items provided no change occurs in the fund balance of the budgeted funds, and
- Revisions in the balance sheet accounts provided no change occurs in the fund balance of the budgeted funds.

The Office of Public Instruction cannot process TFS changes that affect the fund balance in a budgeted fund because fund balance is carried forward to the FY2015 budget, and a change in fund balance may impact the number of mills already levied in the fund.

Revisions should be submitted to Steve Hamel by following these procedures:

1. Photocopy the original page of the Trustees Financial summary with amounts to be revised ***~~crossed out~~*** and the correct amount written above or beside it.
2. When sending balance sheet account revisions, please also send any expenditure and revenue line item changes that correlate with such changes. The fund balance on the balance sheet should equal the ending fund balance shown on the statement of revenues, expenditures and changes in fund balance report after the revisions are made.
3. Change any sub-totals and totals that will be affected.
4. Sign, or initial, and date any sheets you may be sending.
5. Scan and e-mail the revisions to [shamel@mt.gov](mailto:shamel@mt.gov), or fax the revisions to Steve at (406) 444-0509, or mail them to P.O. Box 202501, Helena MT 59620-2501. Please submit the revisions by December 10, 2014, to ensure that questions or problems related to processing the changes can be addressed before school districts are closed for the holiday break.

Note that immaterial line item coding changes that affect fund balance in the budgeted funds for FY2014 must be reported as a prior period adjustment on the Trustees Financial Summary for the current year (FY2015). The district may need to adopt a budget amendment for the current year to record a prior period expenditure adjustment in a budgeted fund.

OPI contact: [Steve Hamel](#), (406) 444-0783

**PUPIL Transportation**

## **National School Bus Safety Week**

The National School Transportation Association (NSTA) and the National Association for Pupil Transportation (NAPT) are promoting ***School Bus Safety Week, October 20-24, 2014.***

During this week, school districts are encouraged to plan special events highlighting school bus safety.

Contact your district's pupil transportation director and plan educational activities to teach pupils, parents and motorists about school bus safety.

Visit the following links for some great websites that are made just for children:

- National Association for Pupil Transportation: [CLICK HERE](#)
- School Bus Safety Web-North Carolina: [CLICK HERE](#)
- Safe Kids Worldwide: [CLICK HERE](#)

## **Bus Driver Qualifications Amendment to ARM 10.64.201 and 10.7.111**

OPI has amended and adopted Administrative Rules of Montana 10.64.201 and 10.7.111, pertaining to School Bus Driver Qualifications.

Effective August 8, 2014, drivers are required to obtain CPR instruction in conjunction with their CDL, First Aid, and Medical Certification. CPR instruction must be signed by a certified instructor, and be received after an initial in-person training of at least four hours. Newly hired bus drivers are required to pass a name-based, or fingerprint-based, criminal background check prior to employment with a school district or contractor.

The OPI recognized that complying with the August 8, 2014, effective date for the Bus Driver Qualifications may have been difficult creating a hardship to districts. Therefore, a 60 day grace period was granted to districts. Districts must comply with the requirements no later than ***October 31, 2014.*** Districts that have not met the requirements by the end date of the grace period will not be eligible to receive their full state and county transportation reimbursement.

The bus driver certificate forms (TR-35) are provided electronically by the Superintendent of Public Instruction. As in the past, the district must input all necessary documentation into the Pupil Transportation application, which generates the completed certificate. Only authorized users will be able to enter and update driver information. (User name and password are required). The chairperson of the board of trustees must sign the certificate. The district retains a copy of each bus driver's certificate, provides a copy to the bus service contractor, if applicable, and files a copy

of the certificate with the county superintendent. The bus driver is also given a copy and it ***must*** be carried at all times while driving a school bus.

OPI contact: Donell Rosenthal, (406) 444-3024 or [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

### **Bus Routes (TR-1's)**

By ***November 1***, a district must send the county superintendent one copy of the TR-1 for each bus route and submit a TR-1 for each bus route electronically to the Superintendent of Public Instruction. Each TR-1 must be signed by the board chair and county superintendent.

By ***November 10***, the county superintendent must electronically mark each TR-1 submitted by the district as "Received". If county superintendents do not electronically mark TR-1's as "Received" this will prohibit districts from submitting their Bus Route Claims (TR-6's).

OPI Contact: Donell Rosenthal at (406) 444-3024 or email [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

### **Salary and Compensation Expenditure Reporting**

MAEFAIRS is currently available for the salary and compensation expenditure reporting. However, many districts may not be able to complete the data entry. The Salary and Compensation Expenditure Report requires that all employees who received a paycheck during the fiscal year 2014 be entered into the district's 2013-14 TOE data. For many districts, the 2013-14 TOE did not include employees hired after the TEAMS application was closed.

Although the TEAMS application is open for 2014-15 reporting, the 2013-14 TOE is not available for data input. If you need to add records to the 2013-14 TOE, contact [OPITEAMS@mt.gov](mailto:OPITEAMS@mt.gov) and we will add you to our list of districts that need to have the TOE rolled back. You will be contacted when this option is available. Do not wait until after your 2013-14 compensation expenditure report is complete to do the 2014-15 TOE. Export your 2013-14 report from your HR system, save it to a location you can find/access at a later date, and move on to the 2014-15 year. You will need to get your 2014-15 TOE in as soon as possible, because your district needs this in place to move forward with the accreditation portion of TEAMS.

OPI contact: [opiteams@mt.gov](mailto:opiteams@mt.gov).

### **TEAMS Work Sessions**

The OPI is happy to announce we are providing TEAMS work sessions this fall! During these sessions, participants will bring and enter their own data into TEAMS,

with face-to-face assistance with OPI staff. Registration is required for the work sessions, and due to space limitations, attendance is limited to two people per school system. More information can be found on the [TEAMS Help Page](#).

OPI contact: [the OPI TEAMS Help Line](#), (406) 444-9444

### **OPI's Proposed Bills for the 2015 Legislative Session**

Superintendent of Public Instruction Denise Juneau has requested five bills to be drafted for the 2015 legislative session. These bills are in the drafting process with the Legislative Services Division. The focus of the proposed legislation is to provide on-going state funding to schools to build and maintain quality educational programs and to support local efforts to raise high school graduation rates. The proposals are summarized below. A list of OPI's bills is posted at [CLICK HERE](#).

#### **LC 190 - Increase K-12 BASE Aid**

This proposal is to increase the basic and per ANB entitlements, the quality educator payment, the Indian Education for All payment, and the American Indian Achievement Gap payment by 2.33% in FY 2016 and by 1.79% in FY 2017.

#### **LC 189 - Raise legal dropout age to 18 or upon graduation**

This proposal is to raise the legal dropout age by requiring students to attend school until the earlier of 18 years of age, upon high school graduation, or upon satisfaction of the requirements for equivalency of completion of secondary education. The proposal provides an exception from compulsory enrollment for a student who is at least 16 years of age, has withdrawn from school, and has enrolled in an adult basic education program, the Montana Youth Challenge program, a Montana job corps program, an accredited post-secondary program, or a registered apprenticeship program.

#### **LC 188 - Provide ANB funding for 19 year olds**

This proposal is to include 19 year olds in the school district enrollment used for determining the district's average number belonging (ANB). This proposal will provide resources and incentives to school districts to keep students in school until the student can meet graduation requirements.

#### **LC 187 - Eliminate Winter Enrollment Count**

This proposal is to eliminate the official school enrollment count on the first Monday in December. This third enrollment count was added by SB 175 in the 2013 legislative session. The addition of this third count created many hours of work for both schools and OPI. Statewide school districts lost state funding (approximately \$100,000) by the

addition of this enrollment count. If the December count is eliminated, schools will continue to report enrollment in October and February for the determination of ANB funding.

#### LC 186 - School Finance clean up legislation

This bill draft request is a placeholder for legislation to coordinate and “clean-up” sections of Title 20, MCA that raise problems for the implementation of school finance laws.

OPI contact: [Madalyn Quinlan, Chief of Staff](#), (406) 444-3168

#### **Grants for High Schools**

The Student Assistance Foundation (SAF) has granted \$50,000 to the Graduation Matters Montana-SAF College Readiness Fund. This is the third year SAF has granted Graduation Matters Montana (GMM) funding to support college readiness and FAFSA completion activities. Grants of \$2,500-\$5,000 are available to Montana public schools. [Information about how to apply for the GMM-SAF grant can be found on the “grant opportunities” section of our website.](#) Application are due October 6, 2014 by midnight.

OPI contact: [Jennifer Bezanson](#), (406) 444-3526

#### **Approval REMINDER for 2014-2015 Carl D. Perkins Career and Technical Education Grants**

The Career and Technical Education (CTE) Division of the OPI reminds all high school districts intending to submit a 2014-2015 Carl D. Perkins Career and Technical Education Grant application to obtain final approval from the OPI for your initial application through the E-Grants system no later than Friday, October 31, 2014.

Only the initial/original application is subject to this deadline. Amendments to your approved application can occur after the October date.

OPI contact: [Diana Fiedler](#), (406) 444-9019

#### **Montana Conference of Education Leadership (MCEL)**

The 2014 Montana Conference of Education Leadership (MCEL) will be held in Billings on October 15<sup>th</sup> – 17<sup>th</sup> at the Holiday Inn Grand, 5500 Midland Road, Billings, MT and the Billings Hotel and Convention Center, 1223 Mallowney Lane, Billings,

MT. An agenda, session descriptions, on-line registration and hotel information is located on the MCEL website at: [www.mcel.org](http://www.mcel.org)

### **MASBO Workshops**

MASBO is offering a variety of workshops in October and November. For a description of each workshop and access to the registration form, click on the associated link below:

**October 27:** Technology Workshop – Billings Hotel & Convention Center: [Click Here](#)

**October 28:** Elections Workshop – Billings Hotel & Convention Center: [Click Here](#)

**November 18:** Technology Workshop – Hilton Garden Inn in Missoula: [Click Here](#)

**November 19:** Elections Workshop – Hilton Garden Inn in Missoula: [Click Here](#)

**November 20–21:** New Clerk Academy – Hilton Garden Inn in Missoula: [Click Here](#)

For more information, contact Denise Williams at [dwiliams@masbo.com](mailto:dwiliams@masbo.com) or (406) 442-5599, or Marie Roach at [mroach@masbo.com](mailto:mroach@masbo.com) or (406) 443-0631

### **RESOURCES AVAILABLE ON IRS WEBSITE**

The Internal Revenue Service (IRS) has a section of information resources for federal, state and local government employers. Click on this link: [CLICK HERE](#) and check out their newsletter, fact sheets and FAQs on various topics of interest.

### **SCHOOL FINANCE DIVISION:**

**Debbie Casey** [dcasey@mt.gov](mailto:dcasey@mt.gov)

**Donell Rosenthal** [drosenthal@mt.gov](mailto:drosenthal@mt.gov)

**Dennis Clague** [dclague@mt.gov](mailto:dclague@mt.gov)

**Paul Taylor** [ptaylor2@mt.gov](mailto:ptaylor2@mt.gov)

**Steve Hamel** [shamel@mt.gov](mailto:shamel@mt.gov)

**Nicole Thuotte** [nthuotte@mt.gov](mailto:nthuotte@mt.gov)

**Nica Merala** [nmerala@mt.gov](mailto:nmerala@mt.gov)

**Kathleen Wanner** [kwanner@mt.gov](mailto:kwanner@mt.gov)

**Janelle Mickelson** [jmickelson@mt.gov](mailto:jmickelson@mt.gov)

### **USEFUL LINKS**



State Entitlement Payments to Schools: [CLICK HERE](#)

School Accounting: [CLICK HERE](#)

Forms and Publications & Tuition: [CLICK HERE](#)

Pupil Transportation: [CLICK HERE](#)

Student Count for ANB: [CLICK HERE](#)

Audit Information: [CLICK HERE](#)

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Montana Office of Public Instruction  
1227 11th Ave

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Denise Juneau, Superintendent  
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